

We are currently updating our site; thank you for your patience.

# **SALES**

# **INVOICES - PRINT SALES INVOICE**

The <u>first</u> time an invoice is printed, it will state: **Tax Invoice**. Each time thereafter, it will state **Copy - Tax Invoice**.

If you need to re-print an original Tax Invoice due to a network connection issue, etc. Then you will need to use the **Print Queue Reprint** functionality.

When using the **'Email'** option to send a Sales Invoice, note that it will be emailed via the **BPO Email Service** on the **server** and <u>not</u> from Microsoft Outlook on your desktop.

Ribbon Access: Sales > Invoices



- 1. The **Sales Invoices** listing screen will display.
- 2. Select the **Site** where the invoice can be located.
  - The example has **Durban** selected.
- 3. Ensure that the **Status** is set to **New Order**.
  - Refer to the **Introduction** above for explanation on printing previously emailed invoices.
- 4. Click on the **row** of the **invoice** you wish to print.
- 5. Click on Print.



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- 6. The Select the option as desired screen will display.
  - Print Invoice will open the Invoice in the Report Pre-

view to view, print, export or email.

• Email Invoice will attach documents, add recipients,

the system will create a .pdf and email the Invoice.

• Print and Email Invoice will display both the Report Preview and Email screens.

## **PRINT TAX INVOICE**

- 7. To print the Tax Invoice, click on the **Print Invoice** radio button.
- 8. Click on Accept.



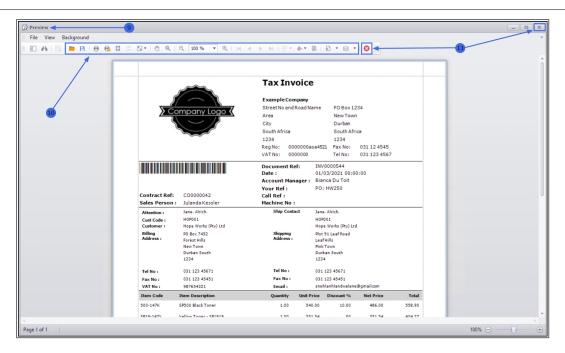
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9. The **Report Preview** screen will display.

Note that the header reads **Tax Invoice**. The **first time** an invoice is printed, it will state: **Tax Invoice**. Each time **thereafter**, it will state **Copy - Tax Invoice**.

- From the preview screen you can make cosmetic changes to the Tax Invoice, as well as Save, Zoom, Add a Watermark, Export or Email from the preview screen.
- 11. Click on **Close** to return to the **Sales Invoices** listing screen.





# EMAIL INVOICE / PRINT AND EMAIL INVOICE

 $\times$  If you get an **error** when trying to email the document, ask your administrator to make sure that the correct shared folder location has been configured in BPO and that you have the relevant folder rights to access the shared folder on the server.

- 1. From the Select the option as desired screen,
- 2. Click on the **Email Invoice** radio button.
- 3. Click on Accept.



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Open Windows 🕶				Use	r : JulandaK 0	3/03/2021	Version : 2.4.0	0.11 Example Com	npany //

4. The **Email Sales Invoice: INV[**invoice number] screen will display, for both Email Invoice or Print and Email Invoice options.

#### **EMAIL HEADER**

- **Employee**: The employee who is currently logged on will display in the employee field. Click on the drop-down **arrow** to choose an alternative employee name, if required.
- From: The email address of the employee will display in this field.
- **To**: To add a contact email address,
  - i. Click on the **search button** to display the **Select a contact for this email** screen.
  - ii. Click on the row of the email address of the Customer Contact you wish to add.
  - iii. Click on **OK**.



• **CC**: If a group email address has been set up on the order or accounts contact, then the group email address will display here.

Additional email addresses can be added to either the To: or CC: by separating the email address with a [;].

• The example has the accounts contact person added to **To:**jackie@builderStorehouse.co.za; accounts@builderStorehouse.co.za.

<b>\$</b> =	13 Email Sales Invoice: INV00	00054	2 - BPO: Version	2.4.0.11 - Example	Company		- <b>x</b>
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То	jackie@buildersStorehouse.co.za; accounts@builderStorehouse.co.	za	* م		,		
cc	group@BuildersStorehouse.co.za	<b>9</b> 5	elect a contact f	or this email 🗜			x
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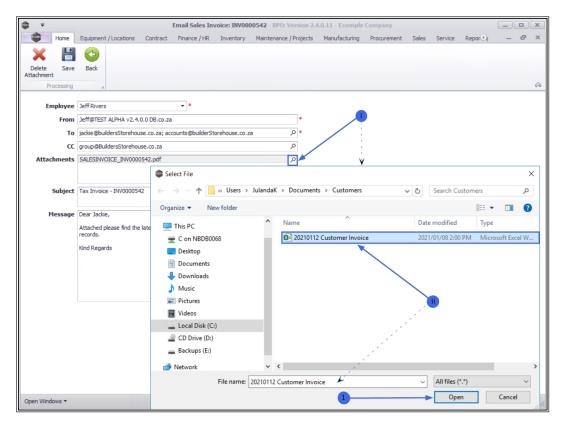
#### **EMAIL ATTACHMENTS**

• Attachments: BPO will create a PDF of the order and attach it automatically (you can attach additional documentation if required).



If there are outstanding parts that have not been issued, a Back Order report will also be attached.

- i. To add an additional attachment, click on the **search** button in the **Attachments** field to display the **Select File** window.
- ii. You can browse to find the file location of the document you with to attach, then click on the file you wish to attach.
- iii. Once you have selected the file, click on Open.



iv. The document has been added as an Attachment.



<b>\$ *</b>			Email Sales In	voice: INV00	00542 - BPO: Versi	on 2.4	.0.11 - Example	Company				
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Message	Dear Jackie, Attached please find th records.	e latest Tax I	nvoice for Builder	s Storehouse f	or your							
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#### **Delete Attachment**

You may choose to delete an obsolete or incorrectly attached document.

- 5. Click on the **attachment** you wish to remove.
- 6. Click on **Delete Attachment**.



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Employee	Jeff Rivers 👻 *		
From	Jeff@TEST ALPHA v2.4.0.0 DB.co.za +		
То	jackie@buildersStorehouse.co.za; accounts@builderStorehouse.co.za $\rho$ *		
СС	group@BuildersStorehouse.co.za		
Attachments	SALESINVOICE INVOI00542.ndf 0 20210112 Customer Invoice.xlsx	5	
Subject	Tax Invoice - INV0000542		
Message	Dear Jadder, Attached please find the latest Tax Invoice for Builders Storehouse for your records. Kind Regards		
Open Windows 🕶		User : JulandaK 03/03/2021 Version : 2.4.0.11	Example Company

#### **EMAIL SUBJECT AND MESSAGE**

• Subject: Click in the text box to type the email subject line.



- Message: Type an email text message.
- 7. Once you have completed your email, click on **Save**.



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То	jackie@buildersStorehouse.co.za; accounts@builderStorehouse.co.za 🔎 *						
cc	group@BuildersStorehouse.co.za						
Attachments	SALESINVOICE_INV0000542.pdf						
Subject	Tax Invoice - INV0000542	]					
Message	Dear Jacke, Attached please find the latest Tax Invoice for Builders Storehouse for your records. Kind Regards						
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8. You will return to the **Sales Invoices** listing screen.



9. Click on the down **arrow** to change the **Status** to **Printed**.



### Invoices - Print Sales Invoice

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	INV0000530		Hope Works (Pty) Ltd		test		Printed	ZAR		
	INV0000529		Hope Works (Pty) Ltd		test		Printed	ZAR		
	INV0000528		Pink Shoes		Swap out Invoice	5,175.00	Printed	ZAR		
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	INV0000522	TIA001	Titan Group		1234	575.00	Printed	ZAR		
	INV0000521	GET001	Get Up and Go		test	621.00	Printed	ZAR		
	INV0000520	GET001	Get Up and Go		1234	1,104.00	Printed	ZAR		
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	INV0000518	NEW 102	New Customer		test	621.00	Printed	ZAR		
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### **Related Topics**

- Print Invoice
- View Invoice
- Send Invoices To Print Queue

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